

# TaiRox™ Memo

## A Comprehensive Guide to Sage 300 Optional Fields

### Realizing the Full Potential of Optional Fields

Sage 300 optional fields can store all kinds of accounting-related data. The data can be stored in all types of transactions. The data flows from one transaction type to another. So far, so good. However, when put into practice, optional field usage often faces these challenges:

- **Visibility:** A user doesn't see the optional fields displayed when and where a user wants to see them. Navigation to a different screen, tab or pop-up is required.
- **Visibility:** For operations that support searching and sorting entries, searching or sorting by an optional field may not be supported.
- **Programming:** For a complete solution, a user wants some behavior to be controlled by optional fields. Additional programming, even if only a tiny amount of programming, is required.
- **Categorization:** Use optional fields as a simplified project costing application.
- **Management:** Setting up an optional field for an entity like a customer, even if the optional field is required, doesn't put an optional field value into the thousands of customer records. Integrity checking reports these omissions as errors.
- **Management:** It is very common to set up optional fields, put them into practice, and then realize that they should have been set up a different way. It is difficult to remove optional fields correctly and they can hang around, affecting performance and database size.

### Making Optional Fields More Visible - TaiRox Productivity Tools

TaiRox Productivity Tools is comprised of over 50 different programs that add hundreds of features to Sage 300. Some of these features make optional fields more visible. Suppose you want to see specific information about a customer when entering an order. You have to navigate to another window to see this information. Extended Order Entry will show selected customer optional fields when entering an order. These are customer optional fields, not order header or order detail optional fields.

The screenshot shows the 'PTDEMO - Extended Order Entry' window. The 'Optional Fields' tab is selected, displaying a table of optional fields for the customer 'Mr. Ronald Black'. The table has two columns: 'Optional Field' and 'Value'. The first row shows 'UPS Zone' with the value 'WHI'. The second row shows 'Note' with the value 'Allow greater vol...'. The table is highlighted with a red border.

Optional Field	Value
UPS Zone	WHI
Note	Allow greater vol...

## Making Optional Fields More Visible, Searchable & Sortable - TaiRox CRM & Collections

TaiRox CRM & Collections provides collections and sales features integrated into the Sage 300 desktop and stored in a Sage 300 company database - at a small fraction of the cost for other CRM offerings. When Companies (Customers or Prospects) are displayed, optional field columns appear in the grid and are one of the Order By options. When you type RED into the Search field, internet-like search capabilities will find all entries with an optional field having the value RED, as well as matching against other company fields.

The screenshot shows the PTDEMO - Companies application window. The 'Name' field is set to 'ACME Plumbing' and the 'Customer Number' is '1210'. The 'Order By' dropdown is set to 'UPS Zone'. The table below shows a list of companies with optional fields highlighted in red boxes.

ID	Name	Short Name	Street 1	Street 2	UPS Zone	Note	City	State/Prov.	Country	Zip/Postal C.	Customer ...	Phone Number	E-mail
4	ACME Plumbing	ACME	927 Warehouse ...		BLU		Kansas City	MO	Canada	59782-1775	1210	(816) 555-3341	
11	Dr. Dan Penn	PENN	1876 Jackson Str...		BLU		Des Moines	IA	USA	72784	1600	(515) 555-4728	
14	Mr. Stroud Oscar Persall	PERSA	4931 Trent Street		BLU		Philadelphia	PA	USA	31247	2130	(215) 555-4375	StroudP@e
15	Forester Building Supplies	FORES	#46 North Gate M.		RED		San Franci...	CA	USA	98132	2235	(415) 555-9830	
18	Bashaw Bulldozing	BASHAW	2398 Colorado Cr...		RED		Burlingame	Ontario		L7L 2Y9	7100	(905) 555-1212	
19	CanAm Industries	CANAM	1838 King George...		RED		Toronto	Ontario		L7Y 3Z1	7200	(416) 555-8752	
20	The Royal Cavendish Co.	ROYAL	8940 Mason Circle		RED		London	England		NW8 1Y2	7300	(416) 435-3463	
21	The Yoshida Gardens	YOSHIDA	2219 Yoshida Place		RED		Tokyo	Japan		03-0962-3232	7400	(061) 452-1452	
12	J & Y Builders Ltd.	J & Y	333 Ralston Way		RED	Credit risk - order amount restr...	Sacramento	CA	Canada	98274-6233	1890	(916) 555-9821	
13	Mr. Ronald English	ENGLI	2375 Hudson Ave...		RED		Fairbanks	AK	USA	79160	1970	(907) 555-1719	rsenglish@
1	Bargain Mart - San Diego	BMT-SD	Bargain Mart Plaza	Comer 182nd and	RED	Send customer two copies of ...	Anytown	CA	USA	45112	1100	(408) 451-8981	Jose@barg
2	Bargain Mart - Oakland	BMT-OK	Bargain Mart Plaza	Comer 182nd and	RED		Anytown	CA	USA	45112	1105	(408) 451-8981	Jose@barg
5	The Courtyard	COURT	10349 Sherman C...		RED		Fairbanks	AK	USA	79182	1240	(917) 555-4444	
6	Coastal Electric Company	COAST	586 Tanner Road		RED		Toronto	Ontario	Canada	67182-1087	1400	(416) 555-4799	
7	Custom Comfort	CUSTO	3741 Main Street		RED		Richmond	VA	USA	23519	1500	(804) 555-7272	
8	Mr. Stephen Kershaw	KERSH	4730 112th Street		RED		Richmond	VA	USA	23503	1520	(804) 555-3372	kershaw@
9	Astral Construction Co Ltd.	ASTRA	418 Canal Drive		RED		Austin	TX	USA	78767-6112	1550	(512) 555-9192	service@as
10	Break-Away Designs	BREAK	743 Wark Street		RED	Usually late in payment - sales...	Sacramento	CA	USA	93721	1580	(916) 555-1422	contact@b
23	Cash Transactions	CASH			RED						9999		
24	Business Works!	BUSWRKS	PO Box 3399		RED		Toronto	Ontario	Canada	L7Y 3Z1	APPLY-BF		

## A Tiny Case Study in Flexibility and Visibility – Production Board

How do you display a “Production Board” – a list of tasks being displayed on monitors in a warehouse – just like flight displays at an airport. Using CRM & Collections optional fields, and hiding most of the standard fields, a free-format solution was provided – in other words the unsophisticated users could enter Apr 17 or 2025/4/17 for a date, and ORD009305 or 9306 for an order number – the users understand what these entries mean. Auto-refresh was added.

The screenshot shows the CHKSEA - Cases application window. The 'Name' field is set to 'Joe' and the 'Customer Number' is 'APPLY-OI'. The 'Order By' dropdown is set to 'Priority'. The table below shows a list of cases with optional fields highlighted in red boxes.

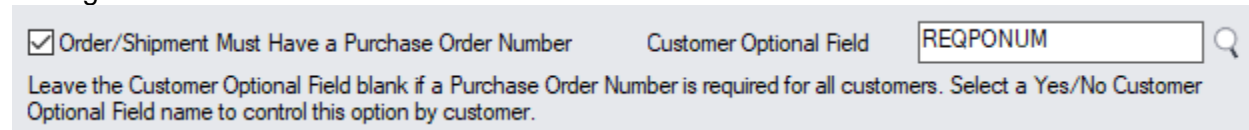
ID	Customer	Description	Order #	Bin	Due Date	Priority	PO	Parts	Machined	Technician	Comment
11	Basher	1513	26805	C125	2025-04-15	3	Y	Y	N	Joe(3)	
2	Ronald Black	1511	ORD26800	C124	April 17	2	Y	Y	Y	Sal(2)	Overtime authorized
12	Job	One off	None	123x	May 23	1	Y	N	N	Sal(1)	
13	Ron B	Nothing	Y	C000	2025-04-30	1	Y	Y	Y	Sal	

## Business Solutions = Data + Programming

Sage 300 optional fields can store all kinds of accounting-related data. The data can be stored in all types of transactions. The data flows from one transaction type to another. However, real-world solutions require programming. In the Sage 300 world, this programming is often built into ISV solutions and controlled by configurable settings - a form of "codeless programming".

### A Tiny Case Study in Codeless Programming

Sage 300 will accept orders, with or without a purchase order number. But some companies using Sage 300 want to force users to enter a purchase order on their orders, most of the time. Custom programs or macros can implement this requirement. However, these choices have messy consequences if not done correctly. For a simple-sounding request like this, a few settings as shown below are all that is needed.



Order/Shipment Must Have a Purchase Order Number      Customer Optional Field      REQPONUM      🔍

Leave the Customer Optional Field blank if a Purchase Order Number is required for all customers. Select a Yes/No Customer Optional Field name to control this option by customer.

The user interface shown is from the TaiRox Productivity Tools product that is built as a full SDK module the adds hundreds of features to Sage 300, some of which involve optional fields. The code beneath these choices implements this logic:

- If the checkbox is not selected, Sage 300 operates as if Productivity Tools is not present.
- Otherwise, if the Customer Optional Field is left blank, then all orders and shipments must have a purchase order number before the order or shipment can be saved.
- Otherwise, if the Customer Optional Field is the name of an optional field and if that optional field exists for that customer and that optional field has a "Yes" value then that order or shipment must have a purchase order entered before it can be saved.
- Otherwise, Sage 300 operates as if Productivity Tools is not present.

This example of a tiny requirement illustrates how the value of optional fields can be magnified by products - without users or implementers forced to write programming code. Whenever possible, TaiRox will do custom work as a product enhancement - when one user needs the functionality, there may be other users with the same need.

## Categorization: Using Optional Fields as a Simplified Project Costing Application

Is the Sage 300 Project and Job Costing module too complicated for your needs? Multi-segment general ledger accounts and optional fields could be used – **if only**:

- Optional fields were easy to edit.
- You could add or change the optional fields in a posted batch.
- You could export details to Excel for further analysis.

**Tag Posted G/L Transactions** provides all these abilities.

PTDEMO - Tag Posted G/L Transactions

File Help

Tagged Posted G/L Transaction Range

Select Tagged Posted G/L Transactions By

From To

Fiscal Year 2019 2019

Fiscal Period 01 01

Account Number 5000 5000-200-20

(None)

(None)

(None)

(None)

All Tagged Transaction Field Values

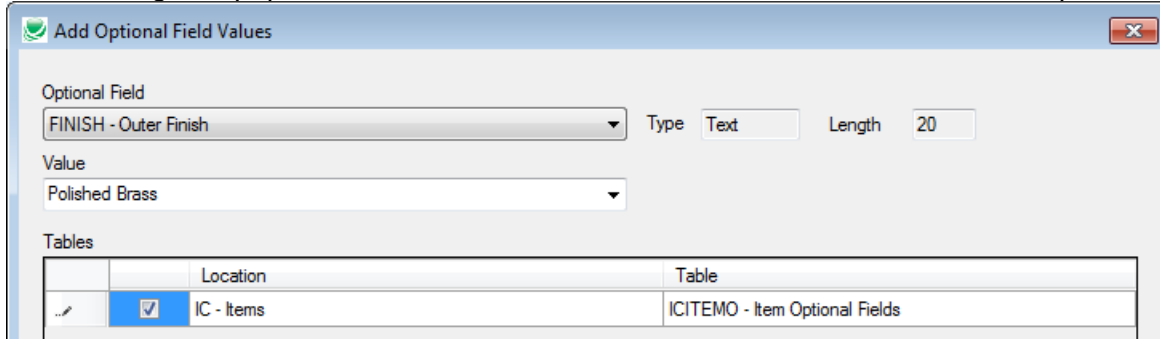
Additional Criteria... Load

Account Number	Account Description	Source Currency Amount	Q Tag Transaction Optional Field	Transaction Tag Description	Fiscal Year	Fiscal Period	Home Currency Code
5000	Cost of goods sold	146.73	ELECTRIC	Electrical Contractors	2019	01	CAD
5000	Cost of goods sold	9.36	ELECTRIC	Electrical Contractors	2019	01	CAD
5000	Cost of goods sold	15,741.36	LABOUR	Labour	2019	01	CAD
5000	Cost of goods sold	1,706.642	CEMENT	Cement	2019	01	CAD
5000	Cost of goods sold	-46.36	ELECTRIC	Electrical Contractors	2019	01	CAD
5000	Cost of goods sold	1.98	ELECTRIC	Electrical Contractors	2019	01	CAD
5000	Cost of goods sold	120.54	LABOUR	Labour	2019	01	CAD
5000	Cost of goods sold	7.92	ELECTRIC	Electrical Contractors	2019	01	CAD
5000	Cost of goods sold	1.23	CEMENT	Cement	2019	01	CAD
5000	Cost of goods sold	15,449.34	LABOUR	Labour	2019	01	CAD
5000-100	Cost of goods sold	144,320.13	CEMENT	Cement	2019	01	CAD
5000-100	Cost of goods sold	1.56	ELECTRIC	Electrical Contractors	2019	01	CAD
5000-200	Cost of goods sold	70,736.38	PLUMBING	Plumbing Contractors	2019	01	CAD
5000-200-20	Cost of goods sold	5.45	PLUMBING	Plumbing Contractors	2019	01	CAD
5000-200-20	Cost of goods sold	42.88	CEMENT	Cement	2019	01	CAD
5000-200-20	Cost of goods sold	675.81	CEMENT	Cement	2019	01	CAD
5000-200-20	Cost of goods sold	-270.71	PLUMBING	Plumbing Contractors	2019	01	CAD
5000-200-20	Cost of goods sold	-433.14	CEMENT	Cement	2019	01	CAD

Export... Close

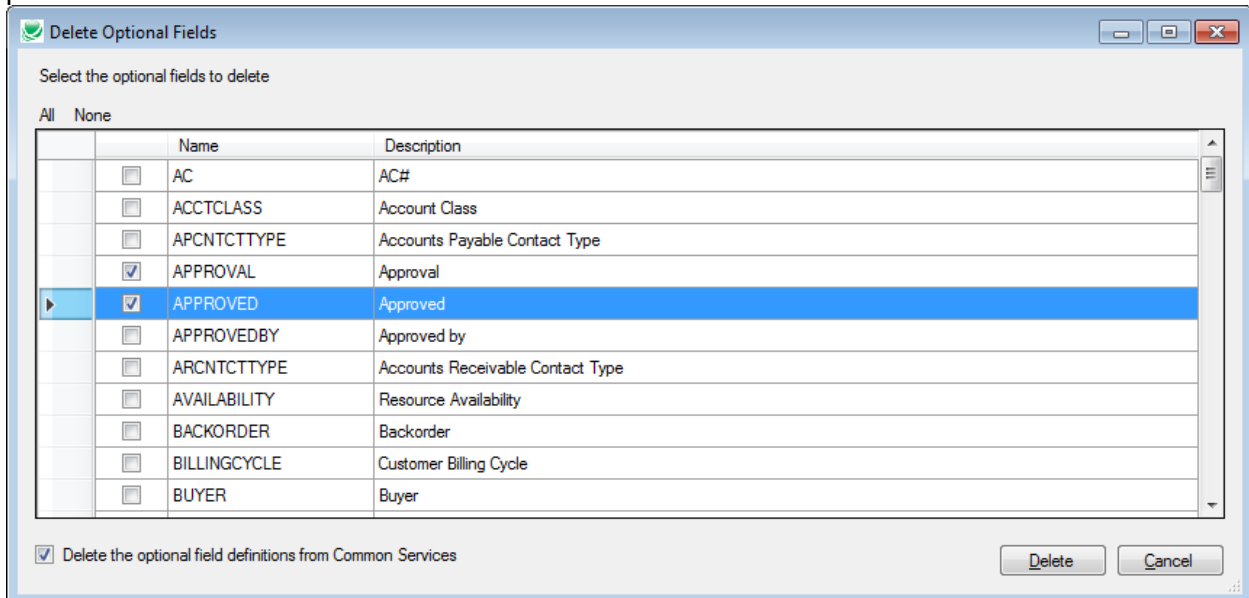
### Management: Making Optional Fields Easier to Add - Optional Field Manager

You have just added an optional field "FINISH" to inventory items. Of your 1000 items, 990 have "Polished Brass" as their finish and 10 have a different finish. How do you populate the 1000 optional fields? You can visit every one of 1000 items and add the Optional field or use Optional Field Manager to populate all the items with Polished Brass then visit the 10 exceptions.



### Management: Making Optional Fields Easier to Delete - Optional Field Manager

You may decide that you want to get rid of some optional fields. In circumstances where licensing for optional fields has been removed, you may be surprised to see that the lack of a license doesn't mean that the optional fields have been removed. TaiRox has seen order entry detail lines with dozens of optional fields that are not being used and have a significant effect on performance.



## Management: Optional Fields and Data Integrity

You can add a "Required" optional field to a customer, vendor, account or many other Sage 300 entities. When you do and run the Sage 300 data integrity checker errors will be reported. The TaiRox Fast Data Integrity program allows you to include or omit these errors.

- You may wish to omit this kind of error until the optional field is fully populated - so that significant errors are not hidden in a list of hundreds or thousands of errors.
- You may not want to add a required optional field to inactive records or records from 5 years ago. Fast Data Integrity allows you to limit error reporting to current data.

